DEPARTMENT OF THE ARMY
OFFICE OF THE DEPUTY CHIEF OF STAFF, G8
WASHINGTON, DC 20310-0700

REPLY TO
ATTENTION OF

DAPR-DP   17 September 2004

MEMORANDUM FOR OPERATIONS RESEARCH/SYSTEMS ANALYSIS ADVISORY COMMITTEE

SUBJECT: Minutes of the 26th Operations Research/Systems Analysis (ORSA) Advisory Committee Meeting

1. The ORSA Advisory Committee held its 26th session on 16 September 2004 in the Pentagon. The agenda is at enclosure 1 and the list of attendees is at enclosure 2.

2. The principal focus of the meeting was to provide a "state of the union" for FA49 and CP16, 1515 series analysts, and to develop a consensus for the way ahead on various initiatives affecting the Army Operations Research community. These include drafting doctrine and TTP for and ensuring immediate fill of authorizations in UEx and UEy units, developing an enduring method for providing reach-back assistance to UEx and UEy analysts, creating a concept plan for the purchase, training and distribution of the ORSA toolkit and conducting a review of the final pilot version of the FA49 Qualification Course.

3. Meeting summary.

   a. Mr. Hollis, the DUSA (OR), welcomed the committee and reiterated the concern that the FA49 and Army Operations Research community as a whole faces significant challenges in the months and years ahead to regain and retain operational relevance within the functional area.

   b. MG Melcher, the FA49 Personnel Proponent Executive Agent, set the tone for the meeting to allow for discussion of ideas and building of consensus for the road ahead for the ORSA community.

   c. MAJ Mark Phillips, the FA49 Personnel Proponent Action Officer, discussed the current status of the initiative to assign FA49 officers within the UEx and UEy organizations.
He also introduced a potential reach-back activity support protocol in which CAA would serve as the reach-back agency for analysts assigned to the UEy and TRAC would provide support to analysts assigned to the UEx. MAJ Phillips also briefly touched on MIL-CIV conversion and its impact on FA49. FA49 will convert 39 positions that were voluntarily identified for re-coding to civilian authorizations. The majority of these positions serve as the authorizations that will be made available for the UEx and UEy FA49 billets.

   d. MAJ Marc Lee, PM for the FA49 Q-Course, presented an after-action-review of the FA49 Qualification Course pilot that ran from 7 JUN to 28 JUL 04. 13 students attended this year's course and the class included 1 USMC officer, 2 GS13s, 2 USAR, and 8 AC officers representing 8 different basic branch backgrounds. Student comments were very positive and,

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along with faculty observations, contained some useful recommendations for adjustments to balance the timing of case studies and capstone events. The senior advisory group members agreed that while the total number was slightly lower and average year group that attended was slightly higher than planned, the class mix is about where it should be for each FY's offering. In the long term, expect that 36-40 officers per year will require Q-course training and the course will be offered once a year with two staff groups. The senior advisory group members agreed that Fort Leavenworth is the appropriate location for the Q-course.

e. Ms Pat Cook, from the CP16, 1515 Coordinator Office, presented statistics on the 1515 ORA community, addressed training and personnel records concerns, and gave an overview of the inaugural ORSA Hall of Fame induction ceremony. She stated the training concern that greening programs have been cancelled indefinitely due to lack of funding, spoke about the need to continue to include the 1515 series analysts as students in the Q course, and requested that all leadership spread the message to have their employees update their personnel files to ensure their education records are correctly documented. Ms Cook also raised the concern that while certain civilian universities give up to nine credit hours for ORSA MAC, civilian personnel agencies will not allow it to count towards the prerequisites for qualification as an ORSA. Mr. Vandiver recommended that she look into getting CPAC to allow ORSA MAC to satisfy some of the base civilian ORA requirement.

f. MAJ Todd Henry, the HRC FA49 field grade assignment officer, gave a briefing on the policies, procedures and tools that are currently being used by HRC to man the agencies and units that possess FA49 authorizations.

(1) MAJ Henry presented the current OPMD manning guidance, the manning priorities that result from this guidance and illustrated where various analytical agencies fell within these priorities. He also addressed the new officer dynamic distribution system (DDS) that replaced ODS. The new system allows for refinement of manning data during modeling, which will balance out the anticipated available population in an effort to provide commands the personnel they need most. It also seeks to assign officers based on a hierarchy of principles such as the needs of the Army, career progression of the officer, the officer's skills and individual concerns. MAJ Henry emphasized that there are, and will continue to be, more FA49 authorizations than officers available and despite DDS, some authorizations would remain unfilled.

(2) MAJ Henry also discussed the recent G-1 decision to discontinue the functional area designation board and replace it with a preference-based system that should provide functional areas with a larger population of captains from which to select.

(3) The senior advisory group discussed the need to identify appropriate majors and lieutenant colonels for UEx and UEy assignment. The Army modularity timeline entails the first UEx assignments made in the summer of 2005. This duty should likely be a second FA49 assignment for a major or lieutenant colonel. Senior rater "3 future assignment" recommendations on OERs will assist HRC assignment officers to identify suitable officers.

g. Dr. Bob Simmonds, Chairman of ALMC Systems Engineering Department (SED), highlighted the ORSA MAC attendance statistics, the new system of systems training, and gave an update on the emerging FA49 tool kit proposed for deployed analysts and, in the future, UEx

FA49s. Dr. Simmonds also gave an overview of the concept that he has for a 2 week course to train operators on the use of the toolkit software.

  h. COL Gary Swenson, Chief of Staff, CAA, gave a briefing that communicated the concern that FA49 may not be sending PhDs to initial utilization tours where their newly acquired skills are put to the best use for the Army. OAC proposed that as a student nears the end of their first year of schooling, HRC should identify their likely follow on assignment. This will allow for the student to focus their thesis on subject matter that will bring value to and at the same time help them to build a good working relationship with his or her follow on unit prior to arrival.

  i. Mr. Hollis and MG Melcher adjourned the meeting and thanked members of the committee for their attendance. Mr. Hollis mentioned that we are making progress on getting the Army to accept operations research analysts into the operational Army.

4. Summary of major tasks from the meeting.

  a. FA49 Personnel Proponent Office (PPO) tasks.

    (1) Prepare a presentation on the capabilities, roles and missions of FA49 Officers and schedule time to give the briefing to the Deputy Chief of Staff, G-2.

    (2) Obtain a copy of the G-3, Director of Training mandatory ILE attendance memorandum and evaluate how this will impact both ILE and FA49 Q-course attendance for FA49s.

    (3) Solicit the operations research organizations for names of officers and civilians to attend the FY05 FA49 Qualification course. Plan is to send 15 officers and 1-2 civilians to the course in June 2005.

    (4) Include a "CP16 Update" in future editions of the FA49 newsletter.

    (5) Work with ALMC to develop a concept plan that outlines the purchase, training, distribution and periodic updating of the ORSA Tool kit.

    (6) Post the presentations from the OAC meeting to the FA49 Website.

    (7) Coordinate with CAA and TRAC to develop a reach-back protocol concept plan.

    (8) Examine the options for a re-design of the OAC meeting in the future. This includes but is not limited to exploring the options of conducting a council of colonels (CoC) meeting in the months prior to the OAC session; conducting a General Officer/SES level OAC session followed by a full up meeting; and conducting a CoC in conjunction with MORS and OAC in conjunction with AORS.

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b. HRC tasks (FA49 Assignment Officers).

(1) Be prepared to fill UEx and UEy FA49 authorizations as soon as they are approved and documented. Lean forward on filling current divisional FA49 positions in anticipation of UEx modularity transition.

(2) Coordinate with Directorate of Military Personnel Policy to provide OAC with the DMPP rationale for the priorities assigned to the various analytical agencies and other organizations within the manning priority designations.

(3) Brief FA49 Executive Agent on FA49 field grade officer's assignments for the FY05 summer move cycle not later than December 04.

(4) In coordination with PPO, develop long-range plan to recode appropriate 01A and 02A O-6 positions to which FA49 officers are assigned to 49A authorizations.

(5) Project follow on assignments for FA49 PhD candidates at the completion of their first year of schooling.

c. ALMC task. Work with FA49 PPO to develop a concept plan that outlines the purchase, training, distribution and periodic updating of the ORSA Toolkit.

d. AMSAA tasks.

(1) Prepare quarterly civilian ORA updates and provide to FA49 PPO to include in all future editions of the FA49 newsletter.

(2) Investigate why the civilian personnel management rules do not allow ORSA MAC credits to count towards the prerequisite for qualification to civilian ORSA.

e. PM, FA49 Q-course task. Ensure that the plan to decrease the number of assessed events is consistent with TRADOC training standards.

f. TRADOC Analysis Center task. Coordinate with HRC to ensure Q-course program manager billet remains filled.

5. The POC for this request is MAJ Mark A. Phillips, FA49 Personnel Proponent Action Officer, DSN 225-3869, Commercial (703) 695-3869, or e-mail Mark.Phillips@hqda.army.mil

Encls
as

N. Ross Thompson III
Major General, USA
Director, Program Analysis
    and Evaluation

Twenty-sixth ORSA Senior Advisory Committee Meeting
16 September 2004

1310-1315	Welcome	Mr. Hollis

1315-1320   Opening Remarks   Mr. Hollis/
MG Melcher

1320-1350   FA49 PPO Update   MAJ Phillips
PURPOSE: Update and gain concurrence on proposed initiatives.
UEx/UEy Status of FA 49 positions
Support to deployed Analysts (ReachBack)
Military to Civilian Conversion

1350-1420   FA49 Q-Course Update   MAJ Lee
PURPOSE: Review of second year pilot course, and seek guidance on Way Ahead.

1420-1435   Break

1435-1500   CP-16, 1515 Update   Ms Cook
PURPOSE: Update issues in career field and present names of FY04 Hall of Fame Award recipients.

1500-1540   HRC Brief   MAJ Henry
PURPOSE: Inform and update on manning issues.
Officer Assignment Policy
FA49 Officer Distribution
The Dynamic Distribution System (DDS)
BQ CPT Positions
FY04 LTC Selection Board Summary

1540-1555   Break

1555-1625   FA49 Tool Kit Training   Dr. Simmonds
PURPOSE: Update and gain concurrence on Tool Kit implementation.

1625-1650   CAA PhD Utilization Brief   COL Swenson
PURPOSE: Review policy on utilization of FA49 PhD.

1650-1700   Wrap-Up   Mr. Hollis/
MG Melcher

Advisory Committee Members:

Mr. Walter W. Hollis	Deputy Under Secretary of the Army for Operations Research
LTG Benjamin S. Griffin*	Deputy Chief of Staff, G-8
Mr. E. B. Vandiver III	Director, Center for Army Analysis
MG David F. Melcher	Director, Program Analysis and Evaluation, Office of the Deputy Chief of Staff, G-8
BG James Myles*	Commanding General, U.S. Army Test and Evaluation Command
Dr. Forrest Crain	Director of Analysis and CIO, Office of the Deputy Chief of Staff, G-3
Mr. Vernon M. Bettencourt*	Deputy Chief Information Officer/G-6
Mr. David Shaffer*	Director, US Army Material Systems Analysis Activity
Mr. Michael F. Bauman*	Director, TRADOC Analysis Center
Mr. Steven T. Bagby*	Deputy Assistant Secretary of the Army for Cost and Economics
BG Rhett A. Hernandez*	Director, Officer Personnel Management Directorate, USTAPERSCOM
Mr. Richard W. Price*	Dean, School of Systems and Acquisition Management, ALMC
COL Steven Galing*	Chief, Strength Analysis and Forecasting Division, Office of the Deputy Chief of Staff, G-1
COL Mark Cain*	Chief, Accessions Research Center, U.S. Army Accessions Command
COL Michael McGinnis	Professor and Head, Department of Systems Engineering, USMA
Dr. James N. Eagle*	Chairman, Operations Research Department, Naval Postgraduate School
COL Glenn Sinclair	Chief, OCAR, PAE

Members not attending

Other Attendees:

Mr. Brian Barr**	Representing BG Myles (ATEC)
Ms. Patricia J. Cook**	Representing Mr. Schaffer (AMSAA)
Dr. Robert Simmonds**	Representing Mr. Price (ALMC)
COL Art Kron**	Representing Mr. Bagby (ASA-FM)
COL Eli T.S. Alford	Chief, MAFPAD, G-8, PA&E
COL Gary Swenson	Chief of Staff, CAA
COL Darrall Henderson	Professor, Department of Mathematical Sciences, USMA
LTC Mark W. Lukens	Branch Chief, Officer Programs Strength Analysis, G-1
LTC (P) Walter Barge	Executive Officer, Office of DUSA (OR)
Mr. Duane Clark	ISCF Coordinator, Office of the Vice Director of the Army Staff
LTC Thomas Cioppa**	Representing Mr. Michael F. Bauman (TRAC) and Dr. James N. Eagle (NPS)
Mrs. Sallie J. Schaeffer	FA49 Program Manager
MAJ Mark Phillips	FA49 Personnel Proponent Action Officer
MAJ Todd Henry	FA49 Assignment Officer, PERSCOM, OPMD
MAJ Jerry Baird	FA49 Assignment Officer, PERSCOM, OPMD
MAJ Marc Lee	FA49 Qualification Course Director

** *Representing Advisory Committee Member*